Complete an SDR

Locate an SDR:

1. Select the **Billing** module link. Select **Service Delivery Report** in the navigation bar.
2. Select a contract; click [Select Contract].
3. Select a program; click [Select Program].
4. Within the targeted month, selected a location and click [Go]

Record service information for a single client:

1. Click client name link.
2. Enter number of service units and attendance codes on calendar.
3. Click [Save Draft].

Copy service delivery information:

1. Access the **Record Service Delivery** page for a client. Enter service delivery information if needed.
2. Click [Copy Characteristics].
3. Select one or more clients and click [Apply Pattern].

Apply a Service Delivery Pattern

Record service information for multiple clients at once:

1. Click **Service Delivery Pattern** in the navigation bar.
2. Complete the service delivery pattern information.
3. Select all clients who receive information in this pattern.
4. Click [Apply Pattern]

Attendance Codes

Attendance codes:

- are a required part of recording services,
- may differ from program to program;
- a key to the available codes is found at the bottom of the **Record Service Delivery** page.

Key

Service Code	Description	Attendance Status Code	Unit Type	Unit Increment
DAY	DMH Day	X-Present	Minutes	15
DAY	DMH Day	S-Sick	Minutes	15
DAY	DMH Day	A-Absent	Minutes	15

If client is sick or absent, enter a zero along with the status attendance code.

Process an SDR

Release an SDR:

1. Access the Invoice Summary page.
2. Click Release Invoice.

Authorize an SDR:

1. Access the Invoice Summary page of a released invoice.
2. Click Authorize Invoice.

Reports

View a report:

1. Select the **Reports** module and click the name of the individual report link.
2. Enter criteria and select **Report Format**.
3. Click Run Report.

Report Tips:

- Access to reports is based on user security roles.
- Disable your browser pop-up blocker so reports display correctly.
- Report criteria is not printed on the report or preserved in the system. Users may find it helpful to record criteria manually.

Track Payment

Search for a Payment Request for Commodity (PRC)

1. Select the **Billing** module and select **Search for PRC** on the navigation bar.
2. Enter search criteria and click Search.
3. Click the Program Name link.
   *The **Update PRC** page appears.*

View an Explanation of Benefits (EOB)

1. Select the **Billing** Module, and select **Explanation of Benefits (EOB)** in the navigation bar.
2. Enter search criteria.
3. Click Search.
4. Click the Contract Number link.
   *The **EOB Summary** page appears.*

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